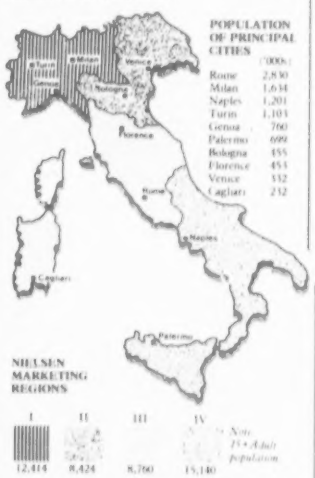
Italy

Because Italy has a large number of regional radio and tv stations, test marketing can be conducted in virtually any section of the country. Tests for major brand introductions have recently been done in Veneto, Toscana and Marche.



Ad spending by key product categories (1982)

	billion L.
Food	166
Cars	158
Alcoholic beverages	109
Pharmaceuticals (OTC)	35
Banks	15
Airlines	8
Tobacco	7
Entertainment	4
Hotels	2
Electrical appliances	0.6

Source: SIP

Spain

POPULATION OF PRINCIPAL CITIES

	('000s)
Madrid	3,188
Barcelona	1,754
Valencia	751
Seville	653
Zaragoza	590
Bilbao	433
Malaga	503

Source: INE 1982

Ad spending by key product categories (1982)

	(million Pta.)
Food	11,731
Automobile/Transport	8,185
Beauty/Hygiene	6,899
Alcohol & Soft drinks	6,753
Education	6,100
Banks	5,943
Commerce	4,864
Household goods	3,671
Leisure/Travel/Entertainment	812
Tobacco	519

Source: Economia 1983

NIELSEN MARKETING REGIONS ('000s)

I 5,950 | II 4,939 | III 7,077 | IVa 3,188 | IVb 4,907 | Va 4,398 | Vb 3,956

Despite socioeconomic profiles that are not truly typical of Spain, the Canary Islands are often used for test marketing because of the presence of regional tv. The total population there is just over 1 million; a typical campaign using tv, backed by radio and magazines, would cost approximately 4.5 million Pta. per month. Testing on the Spanish mainland is sometimes done in Madrid, Barcelona and Valencia.

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in test results," Mr. Fields pointed out.

And the fact remains that test marketing in the U.S. fashion, with test periods lasting from 12 to 18 months, may prove counterproductive by tipping off the Japanese competition.

Because they are confident they know the market, "the Japanese are a nation of hunch players" in an area such as test marketing.

To correct these problems, there are increasing suggestions that American subsidiaries in Japan should follow the lead of their parent organizations in the U.S., relying less on test marketing and more on pre-test market laboratories or home-use tests, or at least to modify American practices for the Japanese market.

"It would be wise for the Western companies to watch how the Japanese do things before imposing their classical test marketing methods," says Mr. Reed. "In other words, when in Rome . . . ."

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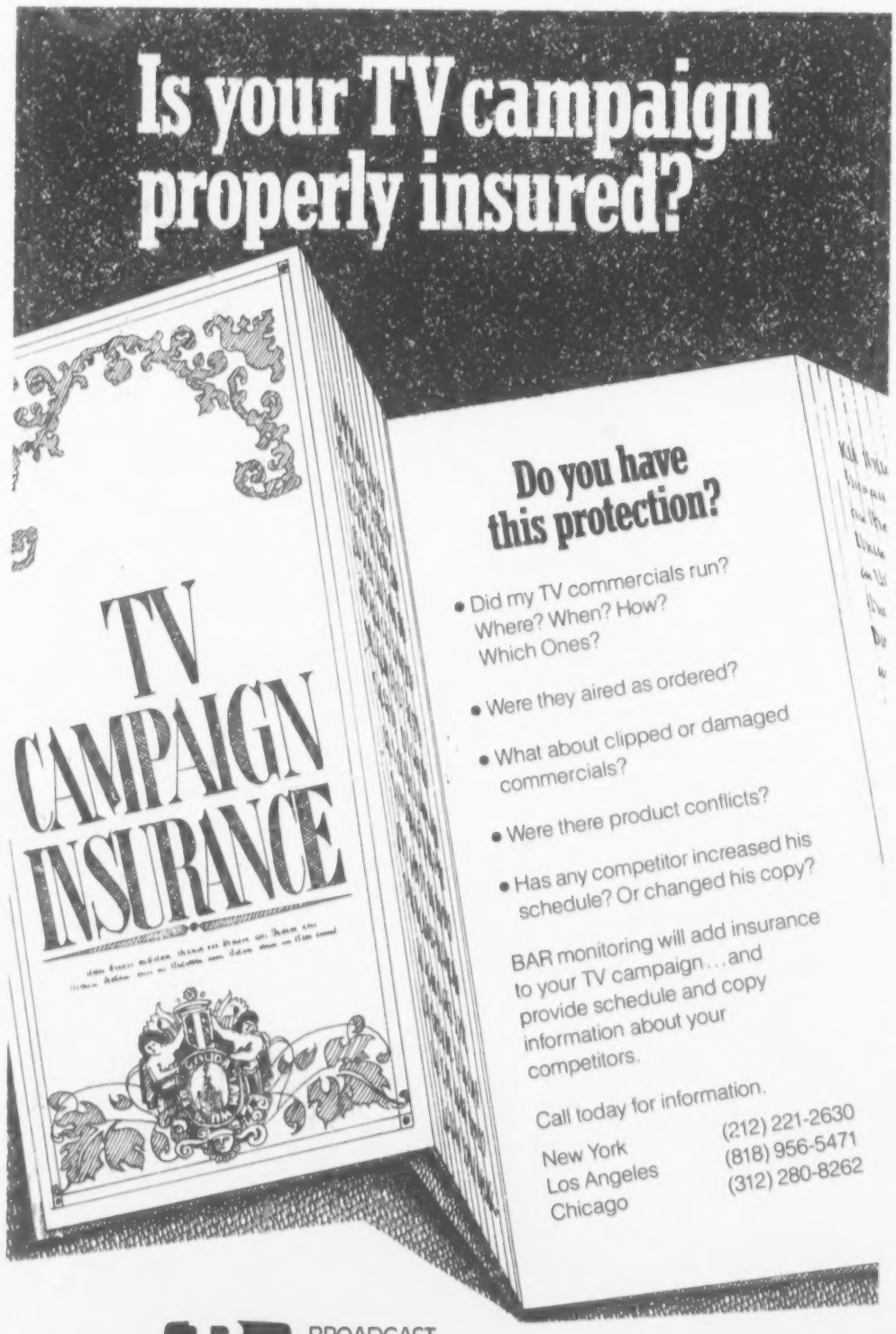

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France

All nine Nielsen regions of France are used for test marketing, as are major cities. The Cote d'Azur and Lorraine areas also are considered good test areas because they both have regional tv (Tele Monte Carlo and RTL Luxembourg, respectively). The year that FR3 begins regional broadcasts in Lille and Bordeaux, those cities are expected to gain importance as test markets.

POPULATION OF PRINCIPAL CITIES

	('000s)
Paris	2,188
Marseilles	874
Lyon	413
Toulouse	347
Nice	337
Strasbourg	248
Nantes	240
Bordeaux	208
St. Etienne	204
Le Havre	199

Source: INSEE 1982

Ad spending by key product categories

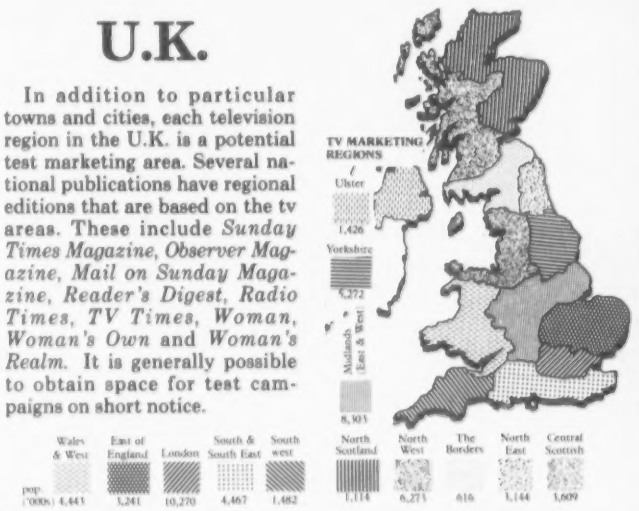
(FF million)

Food	1,855
Leisure/Entertainment	1,769
Services	1,653
Furniture	1,546
Retail stores	1,495
Toilet/beauty products	1,250
Transport industry	1,249
Drink/beverages	942
Clothing	856
Housekeeping products	686

Source: SECODIP 1983

U.K.

In addition to particular towns and cities, each television region in the U.K. is a potential test marketing area. Several national publications have regional editions that are based on the tv areas. These include *Sunday Times Magazine, Observer Magazine, Mail on Sunday Magazine, Reader's Digest, Radio Times, TV Times, Woman, Woman's Own* and *Woman's Realm.* It is generally possible to obtain space for test campaigns on short notice.



Ad spending by key product categories (1982)

(million £)

Food	406
Leisure/Entertainment	189
Financial	164
Automotive	161
Alcoholic beverages	133
Hotels/Travel	121
Household goods	118
Toiletries	114
Electrical appliances	102
Tobacco	60

Note: TV, Radio & Consumer Press Spend Only.
Source: MEAL 1982

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Population	982,200
Households	358,600
Effective Buying Income	$10,542,780,000
Total Retail Sales	$4,796,794,000
Food Sales	$1,212,806,000
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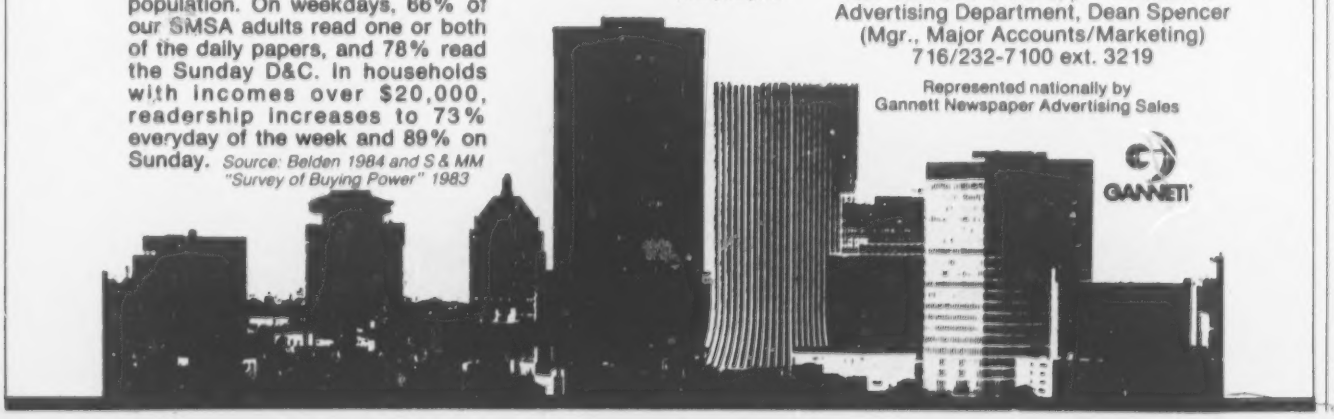

Greece

Salonica and Volos are popular test cities in Greece. Their socioeconomic profiles are similar to that of Athens, and available media include newspapers, cinema, posters and regional radio. The lack of regional tv does tend to somewhat reduce effectiveness of testing.

POPULATION OF PRINCIPAL CITIES

	('000s)
Greater Athens	5,027
Salonica	706
Patras	154
Volos	107
Larissa	102
Iraklion	101

Ad spending by key product categories (1982)

(million Dr.)

Food	1,066
Alcohol	566
Electrical appliances	416
Leisure/Entertainment	373
Tobacco	290
Automobiles	249
Airlines	83
Banks	78
Hotels	33

Source: Nielsen Hellas 1983

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*TAMPA, FL. Countryside Mall•(813) 797-4868
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Many hesitate to simulate

Despite a growing number of marketers who wouldn't test without it, simulated test marketing is far from a universally accepted technique.

Several market researchers say they doubt STM's penetration is beyond 50%.

Companies do not employ simulated test marketing methods because they are not convinced that STM applies to their specific business situations, according to Thomas E. Hatch, vp-new business at Mattel Toys in Hawthorne, Cal.

"I'm amazed that many companies are not using these techniques because the cost of introducing a new product is phenomenal," Mr. Hatch says. Of course, STM techniques must be "customized" to fit individual marketing situations.

Test market techniques usage

Per cent using in past year:	1978 %	1983 %	Net change %
Own test markets, with outside auditing	40	33	– 7
Controlled store testing	32	36	+ 4
Test market laboratories	32	37	+ 5
Test market purchase diaries	15	18	+ 3
Test market telephone tracking studies	49	54	+ 5
UPC consumer diary panel split cable	NA	23	+23
UPC consumer diary panel no split cable	NA	11	+11

Source: Market Facts, Chicago

Rollout

(Continued from Page M-41)
to go faster to market and thus realize sales faster; the company in most cases avoids the cost of test marketing; the company has managed to stop spending on product opportunities that clearly do not meet minimum criteria.

That final point—eliminating potential dud products—may be the most important for corporate growth plans in the coming years, according to Thomas E. Hatch, vp-new business at Mattel Toys in Hawthorne, Cal. Mr. Hatch has 15 years experience in adapting STM models in the consumer products field at Gillette, Miles Laboratories and Mennen Co.

He made the move to Mattel less than a year ago.

"The cost of launching package goods today is now so high that you have to have these [STM] systems to rigorously challenge the product idea and to determine what the financial impact will be," the Mattel executive said. "Even after that, you still don't know whether you have a success because competitive counter measures can be severe," he cautioned.

Mr. Hatch believes many package goods companies will place new (and riskier) emphasis on development of both established brands and new products —rather than on acquisition and corporate takeover—to achieve growth in the 1980s. To assist with this strategy, Mr. Hatch has developed a seven-step new product development process that involves no less than seven STM assessments prior to na-

Simulated test marketing techniques costing about $60,000 found that a proposed Bristol-Myers product called Dissolve would achieve only about 1% of the market.

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vidual business problems, but the potential for new applications is tremendous, the Mattel executive added.

In many cases, use of STM models depends on whether management thinks they work, says Boyd Sneddon, research director for the 'Big G' division at General Mills. "They're very gross tools and the aim in using them is to figure out whether this product has a chance of being successful given the volume criteria set for it. Or is it a bust?"

Mr. Sneddon says his division uses up to eight STM models a year primarily for pre-market volume estimations.

"Our primary reason for using these techniques is to weed out things that aren't worth going forward as contrasted with expecting very precise [market share] estimates from things that do get over the [volume] hurdle," the General Mills research executive explains.

According to Mr. Sneddon, the bottom line is whether product managers feel comfortable pushing products through each step in the development cycle based on assumptions used in the STM models.

Jim Figura, corporate director-market research at Richardson-Vicks, believes one reason for the slow acceptance by marketers of STM techniques is the hush-hush blanket that some companies throw over their research departments.

"There are no secret weapons in market research," Mr. Figura asserted.

"Everyone has access to the same tools and techniques. Some suppliers even sell the same data to direct competitors. The cutting edge is how a company uses what's available and the quality of the people running the show," he says.

tional launch. Two separate STM models serve to screen product ideas in the "concept generation" phase, after which a go/no-go decision is made.

To illustrate, Mr. Hatch recalled an assignment to work on product development of a new analgesic product at Miles Laboratories. After conducting STM techniques, he concluded that the product would not achieve sufficient market share to warrant moving forward. Management agreed and the product was scrapped, he says. The cost of launching a similar product today would be between $30 million and $50 million.

While at Miles Labs, Mr. Hatch also used STM to evaluate the potential effects of a Bristol-Myers Co. test market product called Dissolve. Miles Laboratories, the manufacturer of Alka-Seltzer, was considering a multi-million-dollar defense strategy. Instead, Mr. Hatch conducted STM techniques on Dissolve for about $60,000 and found that it would achieve only a 1% share of the market. Bristol-Myers later went national with the product and, in fact, achieved a 1% share.

"They stopped promoting the product six months later and it died a horrible death," he added.

The STM models not only saved Miles Labs a bundle, Mr. Hatch noted, they gave a quick picture of Alka-Seltzer's positioning in the market.

If Dissolve would have appeared to be more successful, the next step would have been to determine the source of sales volume. If the product appeared to take heavily from Alka-Seltzer's market share, STM techniques could guide the development of an effective defensive strategy based on advertising, trade and consumer promotions, he explained.

STM models, at a cost of $50,000 to $100,000 each, are excellent tools both to determine which products will move into test marketing and to assess the effect of advertising, packaging and product name in establishing a new position in an existing market, he said.

Tested product #9
Company: Campbell Soup Co.
Product: Prego spaghetti sauce
Agency: Leber Katz Partners, New York
Original test markets: Youngstown, O. and Green Bay, Wis.

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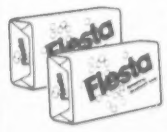

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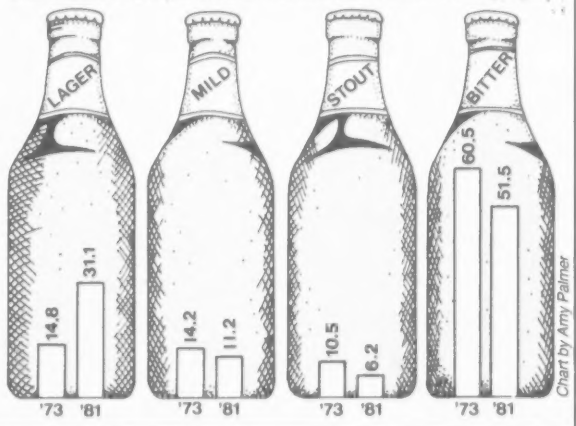
Brewers battle in Britain

Lager gains in Britain

The British thirst for imports has helped lagers double their share of the beer market. This growth has come while stout, such as Guinness, and bitter have lost nearly 10% of market share. Bars show per cent of market. *Source:* Advertising Age.



U.K. beer market changes its taste

By SEAN MILMO

LONDON—The British beer market, one of the largest in the world next to Germany and the U.S., is undergoing major changes.

Vast numbers of British beer drinkers are asking for lighter, amber brews called lagers instead of the dark ales and stouts, like Guinness, for which the country is famous.

As a result, Guinness is looking outside the U.K. for market growth, and Anheuser-Busch is coming into the U.K. with Budweiser, a type of lager *(see related stories)*.

Foreign brands, which account for the largest variety of lagers in the U.K., are soaring in popularity. Carling Black Label from Canada is the U.K.'s No. 1-selling lager, followed by Skol and Heineken from the Netherlands and Foster's from Australia.

Most notable in this list is the absence of a U.K. lager, which, until recently, British brewers have shied away from producing, preferring to concentrate on ales and stouts.

In 15 years, the market share of lagers has grown to 35% in 1983 from 5%. Bitter and mild (both ales) make up the rest of the beer market, with stouts accounting for a small percentage.

In contrast to the ale market, where taste variations are an attribute, the distinguishing characteristic of lagers is their similarity. For the most part, the reason for this is that typical lager drinkers are

(Continued on Page 47)

Guinness may aim for world brand of beer

LONDON—Guinness & Sons, well known for its dark, rich stout, is considering marketing its beer as a "world brand"—the first in the beer industry.

Sources say that is one of several possibilities under consideration by the marketer and its new worldwide agency, Ogilvy & Mather International, which handles the account in nearly every market outside the U.K. and Ireland.

"It is our real intention to be a significant force in the world beer market," says Peter Mitchell, who was named worldwide brand director for Guinness last summer. "We are now set to attack the world, but how quickly, into which markets and with what timing is still to be worked out."

The U.S. is considered critical. A Guinness spokesman said: "Our preliminary research [in the U.S.] reinforces our view that in Guinness we have a unique product which will appeal to people tired of bland beer and looking for flavor and character, and it is our job to market the product so it is exposed to more poeple."

Guinness' other main markets are in West Africa and the Far East. In the U.S. and Europe, Guinness' presence has been negligible, with little or no advertising support.

Meanwhile, other brewers and ad agencies are looking at the idea of creating at least a pan-Europe beer brand.

One reason is that Germany is under pressure from the European Economic Community to open up its beer market to foreign brews (AA, Jan. 23).

One U.S. ad agency has commissioned a study of the beer market worldwide, triggered by the potential in Germany, one of the world's largest beer markets.#

Why U.K. now looks good to A-B

By HOWARD SHARMAN

LONDON—St. Louis-based Anheuser-Busch has a good chance of establishing a U.S. beer in the British market if it can overcome the poor reputation of U.S. beers here, sources say.

If Anheuser-Busch succeeds with Budweiser, other U.S. brewers are expected to tackle a market long considered too tough for U.S. beers.

It appears A-B is going ahead with plans to introduce Budweiser through the London-based Watney, Mann & Truman brewery.

Two ad agencies, J. Walter Thompson Co. and Abbot Mead Vickers/SMS, already are pitching the account.

A-B's original plan, to link with Allied Breweries, fell through last summer (AA, July 11).

A-B withdrew from the deal, apparently because the two partners could not agree on the level of marketing contribution each side would provide, sources said.

Two things A-B has in its favor is that lager is the fastest-growing segment in the beer market and the abundance of continental lagers available here.

Also important is A-B's linkup with Watney, which achieved great success in the early 1970s with the launch of Australia's Foster's lager, which Watney brews in the U.K. and sells on draft here.

However, the biggest obstacle is that U.S. beers do not have a good reputation with the British consumer.

"If you can say a beer comes from Germany, Denmark or even Australia, it works," says one adperson experienced in the beer market, "but people just don't believe that U.S. beer tastes good."

According to one observer close to the Allied-Anheuser negotiations: "The British public has very little experience of American beer. They do not expect it to be good because the U.S. has no brewing tradition. The British consumer expects it to be thin and watery."

All that most British beer drinkers know about U.S. beer is the limited experience they have had with malt liquors like Colt 45 (still sold here by Courage Ltd., a local brewer) and Schlitz malt liquor. But neither achieved any significant level of sales, and the taste was not popular with the consumer.

U.S.-brewed Budweiser has been available in the U.K. in bottles for some time and is sold in a small way in American-style bars and restaurants, but the company is keen on getting draft Budweiser to the mass market through the U.K. pubs.#

RJR's Camel Mild launch shakes up Japanese market

By JACK BURTON

TOKYO—R.J. Reynolds Tobacco International's $5 million campaign to introduce Camel Mild this month here is a major step by a U.S. advertiser to break down barriers to entering the Japanese market.

It is expected to raise a storm of protest among Japanese tobacco marketers, who have been left in the dark about concessions made to major U.S. tobacco companies by the state-run Japan Tobacco & Salt Monopoly (AA, Feb. 13).

The Japanese cigaret market—with $10 billion a year in sales—is the second-largest cigaret market in the world next to the U.S.

About 1,000 tv spots will air in Tokyo for Camel Mild, and print ads and outdoor boards will break in the rest of the country.

RJR estimates that ad spending for Camel Mild will account for more than 20% of all tobacco advertising in Japan this year. A total of $19 million was spent in 1983 on cigaret advertising in Japan, and this sum is expected to grow to $25 million this year.

The RJR launch represents one of the largest ad expenditures for any imported consumer product in Japanese history.

American tobacco companies, which account for 90% of foreign cigarets sold in Japan, estimate that sales of imported tobacco products could reach $2 billion annually, an almost eightfold increase, if restrictions, including high tariff duties, were eliminated.

Currently, foreign tobacco products account for only 1.5% of all tobacco sales in Japan.

RJR, Philip Morris Inc. and Brown & Williamson met last summer with JTS to discuss the government's restrictions on the marketing, advertising and distribution of imported cigarets.

When the tobacco monopoly made concessions in July, it asked that details of the agreement not be publicized in order to avoid any backlash from members of the Japanese Parliament who represent tobacco interests.

However, the size of the Camel Mild campaign, handled by McCann-Erickson/Hakuhodo, is expected to cause a backlash.

Under the JTS ad formula, only one-third of tobacco ad budgets can be used for tv, and tv advertising is permitted for a brand only during the first three years of its introduction in Japan.

In addition, the amount of ad spending permitted is linked to each company's sales volume for the previous year.

Last summer, JTS altered the sales formula, providing for an average 7% to 8% increase in ad spending, and including an inflation index for media costs.#

South Korea protests dbs Japan signal

TOKYO—The successful launch last month of Japan's first operational direct broadcast satellite, expected to begin service in May, has set off a diplomatic flap between Japan and South Korea.

South Korean officials said the dbs signal spillover represents Japanese "cultural aggression."

The officials said the government would ban the domestic production of frequency converters that could be used to pick up the satellite's frequency band.

They also said the government would stop imports of satellite antennas and other direct broadcast satellite receiving equipment from all countries until South Korea launches its own dbs in time for the 1988 Olympic Games in Seoul.

Finally, South Korea vowed to jam the new satellite's signals.

Japan exports more satellite equipment to Korea than any other country.

In anticipation of Japan's new satellite, Matsushita Electric and Toshiba plan to start selling dbs receiving equipment next month.#

world news roundup

(Continued from Page 3)

issue is compulsory licensing—which allows generic companies to copy name brand drugs in return for a 4% royalty to the proprietary company that developed the drug and holds the patent.

NEW YORK—Dow Jones & Co. international executives identified three problems with publishing a Latin American edition of the *Wall Street Journal* at a recent sales meeting. They are: Small advertising base, poor distribution and restrictions against foreigners publishing in Brazil.

PARIS—Procter & Gamble Co. will launch Head & Shoulders shampoo here by next month. Agency: Dupuy-Compton.

SAO PAULO—Interpublic Proeme Publicidade won the $800,000 jeans account of Levi Strauss do Brasil, the second-largest jeans marketer here. The account was formerly with DPZ Propaganda.

ON THE MOVE: Howard Sharman to editor, *Marketing Week* magazine, London, replacing **Stephen Foster**. Mr. Sharman previously was London correspondent for ADVERTISING AGE. . .**Alfred Hirsch** to marketing director, Burger King Holding, Wiesbaden, from account exec, Ted Bates Werbeagentur, Frankfurt.

International

B&B moves to stop downward spiral in Germany

By DAGMAR MUSSEY

FRANKFURT—Benton & Bowles, faced with the fact that a key U.S. executive has been charged with embezzling $3 million from the agency (AA, Jan. 30), has another problem: A severe business hemorrhage in Germany.

In 1983 figures just released by *Horizont/Advertising Age Deutschland*, B&B showed the largest decline in billings of any major German agency—down 18.7% to $38.5 million, slipping from 17th to 21st place.

The situation for B&B may get worse before it gets better: Such key clients as Deutsch Texaco and St. Pauli Breweries' Jever beer are expected to leave the agency this year after the closing last December of B&B's Hamburg office. The two accounted for the lion's share of that office's $6 million in billings.

The biggest blow to B&B in Germany came last October when Procter & Gamble Co. reassigned about $8.5 million in accounts to Luerzer Conrad & Leo Burnett, and gave B&B only the $1.5 million Sanso wool detergent account. The reassignments occurred after Young & Rubicam resigned the P&G business to take on Colgate-Palmolive worldwide.

Then Ralph Schilling, the chief executive officer who was lured from McCann-Erickson two years ago, left B&B. Mr. Schilling was in charge when the agency lost Richardson-Vicks' denture fixative and cold remedy lines, Sunbe n Appliances' Rowenta and Reemtsma's $30 million cigaret media placement.

B&B execs are confident that the agency's new managing director—John Ferries—can turn the shop around. Mr. Ferries, who is presently in Frankfurt as acting chief executive, says, "In Europe we see Germany as the most important country, where we mean to invest heavily."

Mr. Ferries maintains that there are opportunities to come back with such clients as P&G, R-V and the Reemtsma group. He is also looking to buy another German shop.#

Germany's largest agencies

J. Walter Thompson showed the largest billings gain among Germany's top 10 agencies. Source: *Horizont/Advertising Age Deutschland.*

Agency	Gross income $ Millions 1983	Billings $ Millions 1983	Billings $ Millions 1982	Change Per cent
Lintas Deutschland	23.7	158.0	165.0	– 4.3
Team/BBDO Group	22.4	149.2	137.7	+ 8.4
J. Walter Thompson	21.6	144.0	123.8	+16.4
McCann-Erickson	20.4	135.8	138.2	– 2.1
Troost Campbell-Ewald	13.0	87.0	84.0	+ 3.5
Grey Duesseldorf	12.7	84.8	84.8	—
Heumann, Ogilvy & Mather	12.7	84.4	74.5	+13.3
Young & Rubicam	11.9	79.2	75.0	+ 5.7
D'Arcy MacManus Masius	10.2	67.9	64.5	+ 5.2
Doyle Dane Bernbach	10.2	67.8	65.2	+ 3.9

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Source: Erdos and Morgan, December 1980, A Profile of Business Week International Subscribers.

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INTERNATIONAL BusinessWeek

McGRAW-HILL

British TV-AM in reprieve by shareholders

LONDON—TV-AM, Britain's troubled commercial morning tv station, has come back from the brink of collapse.

Early this month shareholders agreed to pump $2.8 million into TV-AM, but only conditioned on cost reductions.

This could involve laying off up to 40 employes, which may trigger a strike by any one of several unions. Without the layoffs, the station would go under in three months, one source said.

TV-AM is usually beaten in the ratings by the British Broadcasting Corp.'s morning tv program, even though TV-AM's number of average peak viewers has doubled to 1.1 million since last summer.

Advertisers and agencies are not convinced that the station is delivering enough housewife viewers.

As a result, the station is able to charge only $4,200 a minute.

Last month, TV-AM execs appealed for advertising directly to major advertisers, bypassing the agencies.#

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Australian ad execs attack salary survey

SYDNEY—The Advertising Federation of Australia, which represents advertising agency executives, is challenging results of a survey of the top 125 executive salaries in Australia.

These salaries, published this month by *Australian Business*, put Michael Ball, 47, vice-chairman of Ogilvy & Mather International, at the head of the list with a salary of $506,660. In all, 18 admen made the list—four of them in the top 13.

Chief executives from U.S.-controlled agencies dominate the list, including O&M; George Patterson Pty. (part of Ted Bates Worldwide); John Clemenger NSW (part of BBDO); DDB/Berry Currie; USP Needham; D'Arcy MacManus Masius Australia; Foote, Cone & Belding, and McCann-Erickson.

Bruce Cormack, AFA director, said, "This is a gross example of speculative bean-counting. It's irresponsible and unchecked writing."

Andrew Clark, *Australian Business* editor, said: "If we erred, it is on the side of conservatism."#

U.K. beer market changes

(Continued from Page 42)

young men who consume beer with their friends in pubs, and they prefer consistency to variety.

"Many lager drinkers do not like differences," says James Best, planning director at Boase Massimi Pollitt, advertising agency for Courage Ltd., a U.K. brewer. "They still want to be sure that if they go from pub to pub they can drink largely similar lagers."

Most of the U.K.'s successful lagers are linked to continental Europe, but Watney, Mann & Truman, one of the top British brewers, broke ranks two years ago when it introduced Australia's Foster's lager into the U.K.

"We came in just at the right time because there was a lot of skepticism about the numerous continental European lagers on the market with German names," says Dennis Miller, marketing director at Watney.

Australia has a reputation in Britain of being a nation of fun-loving beer drinkers with whom the U.K. drinker can identify. Foster's introduction was backed by a $3.5 million campaign, created by Hedger Mitchel Stark.

In London, where the beer was introduced, Foster's took 6% of the draft beer market.

Though it went national only recently, it has helped push Watney's share of the lager market up 3% to 15%.

In line with the trend away from continental lagers, U.K. brewers have developed more confidence about producing their own lagers.

Whitbread & Co. launched its Gold Label lager in northern England one year ago, and Courage just introduced John Smiths lager in the northern and western areas of England and Wales.

But imported premium beers, particularly those from the Continent, are now the fastest-growing sector in the market, even though they still account for only 3% of lager sales.

Holsten, the country's top-selling premium lager, marketed by Watney and brewed by Holsten-Brauerei of Hamburg, was backed by a $3.5 million tv and print advertising campaign last year.

Holsten now has a 70% share of the premium lager market, but it is meeting stiff competition from Allied Brewers' imported Lowenbrau and Whitbread's Kaltenberg.

To expand their market shares in the imported premium category, Grand Metropolitan, owner of Watney, and Allied Breweries recently have set up two separate divisions to sell quality lagers from around the world.#

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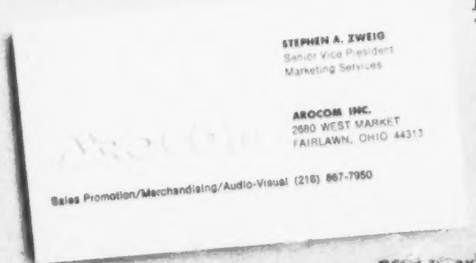

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ad linage

Advertising pages for U.S., Canadian, and foreign consumer publications—*February*

— Art & antiques —

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983
Amercan Artist	66.9	57.7	113.8	103.4
Antiques	112.4	113.8	319.7	288.3
Art in America (11X)	142.4	84.1	243.4	166.3
Plate World	—	—	62.0	84.0
Portfolio (6X)	—	—	—	—
Southwest Art	75.0	65.3	155.8	177.3
Total Group	**396.7**	**320.9**	**894.7**	**819.3**
% change	+23.6%		+9.2%	

— Auto/cycle/rec. vehicles —

AutoWeek	98.8	115.9	201.5	233.9
Car & Driver	62.3	65.2	122.5	118.4
Car Collector & Car Classics	21.1	20.9	41.1	40.1
Car Craft	48.2	68.1	85.2	119.0
Cycle	44.3	74.8	68.2	110.3
Cycle Guide	35.0	45.0	58.4	71.6
Cycle World	46.8	63.9	73.0	88.3
Dune Buggies & Hot VWs	76.6	56.1	157.5	113.9
Family Motor Coaching	129.3	96.7	283.6	214.5
4 Wheel & Offroad	54.4	53.8	96.7	101.6
Four Wheeler	65.1	33.2	113.3	64.6
Hot Rod	37.7	56.3	68.3	87.9
Motorcyclist	31.7	43.7	46.5	64.4
Motor Trend	46.0	56.4	67.6	95.1
Motorhome	79.8	57.4	153.3	116.6
Pickup, Van & 4 WD	25.0	29.0	38.1	50.6
Road & Track	72.0	70.3	145.3	140.4
3 Wheeling	20.5	22.8	45.9	47.4
Trailer Life	109.9	92.7	216.1	180.8
Total Group	**1,104.5**	**1,122.2**	**2,082.1**	**2,059.4**
% change	−1.5%		+1.1%	

— Boating & yachting —

Boating	141.3	117.3	291.5	236.1
Chesapeake Bay	29.1	27.3	56.4	50.1
Cruising World	119.5	123.2	261.6	241.5
Lakeland Boating	53.0	41.0	101.0	82.0
Motor Boating & Sailing	216.3	196.3	387.6	339.5
Sail	144.9	119.2	269.5	222.0
Sea & Pacific Skipper	58.3	66.3	112.7	134.1
Small Boat Journal (6X)	42.6	41.6	42.6	41.6
Trailer Boats	34.3	26.5	60.6	46.6
Western Boatman (6X)	—	—	39.3	19.5
Yachting	166.1	126.2	370.6	321.2
Total Group	**1,005.4**	**884.9**	**1,983.4**	**1,734.2**
% change	+13.6%		+14.9%	

— Canadian —

L'Actualite	42.5	36.2	82.0	67.0
Chatelaine				
English Edition A	90.6	79.3	153.3	145.4
French Edition	75.2	69.0	130.4	124.3
City Woman	—	—	—	—
Equinox	—	—	29.8	40.7
Financial Post Magazine A	41.4	35.9	65.3	53.6
Flare A	—	—	55.2	45.6
Homemaker's Magazine	86.9	96.5	86.9	96.5
Madam Au Foyer	71.5	74.2	71.5	74.2
Macleans (52X) A	98.0	82.7	173.7	150.4
Quest Magazine (8X) A	—	—	—	—
Reader's Digest				
Canadian-English A	66.1	59.1	123.3	114.1
Canadian-French A	58.1	53.4	107.6	105.4
Toronto Life	61.2	60.0	111.9	110.0
Vancouver	50.1	55.0	101.3	116.2
Total Group	**741.6**	**701.3**	**1,292.2**	**1,243.4**
% change	+5.7%		+3.9%	

— Civic/fraternal —

American Legion	33.7	36.8	65.1	78.0
Elks Magazine (10X)	28.1	32.3	63.0	67.7
Kiwanis Magazine	13.5	—	26.8	—
Lion (10X)	11.6	6.3	17.6	11.8
Moose Magazine	28.0	31.0	28.0	31.0
Rotarian	18.9	11.5	36.0	31.0
V.F.W. (11X)	34.0	38.1	63.9	76.0
Total Group	**167.8**	**156.0**	**300.4**	**295.5**
% change	+7.5%		+1.8%	

— Comics —

Archie Comic Group (6X)	10.0	10.0	10.0	10.0
DC Comics	9.0	9.0	18.0	18.0
Marvel Comics Group	10.0	10.0	20.0	20.0
Total Group	**29.0**	**29.0**	**48.0**	**48.0**
% change	+00.0%		+00.0%	

— General —

American Forests	7.0	10.4	15.8	24.2
American Health (6X)	—	—	54.0	31.7
American West (6X)	—	—	25.7	29.3
The Atlantic A	30.4	34.4	60.0	67.3
Audubon Magazine (6X)	—	—	23.6	30.9
Bon Appetit A	81.2	72.1	131.0	133.8
Changing Times	40.8	36.0	88.3	58.6
Cuisine Magazine	54.6	30.1	92.4	56.0
Ebony	81.6	86.1	136.1	145.9
Fifty Plus	37.8	26.0	78.5	52.7
Food & Wine	35.2	30.5	68.5	61.9
Games	17.7	36.9	45.0	62.3
Geo	33.2	24.7	70.6	48.2
Gourmet	71.2	59.3	112.1	101.9
Home Entertainment (6X)	38.0	34.7	38.0	34.7
Harper's Magazine A	17.4	15.3	45.8	33.9
Life	27.9	36.8	112.2	118.9
Modern Maturity (6X)	45.2	40.6	45.2	40.6
Money	112.6	105.7	195.1	169.5
Moneysworth (4X)	—	—	17.2	17.4
Mother Earth News (6X)	62.7	71.7	62.7	71.7
Mother Jones	18.2	19.5	34.9	32.0
National Geographic	13.4	18.5	30.7	35.3
Natural History	47.8	35.4	92.2	60.8
Prevention	79.3	78.2	148.2	150.6
Psychology Today	20.7	26.4	43.0	45.8
Reader's Digest A	82.4	71.8	144.5	134.0
Saturday Evening Post (9X)	—	—	—	—
Signature	54.7	37.3	96.2	93.2
Smithsonian	90.4	72.3	156.9	127.8
Success	35.3	36.8	71.9	75.1
Town & Country	131.1	101.9	196.8	177.0
Travel/Holiday	52.0	42.6	87.1	85.1
Travel & Leisure	106.8	67.6	167.7	126.1
Vanity Fair	22.0	—	47.3	—
Video	65.2	61.0	140.0	131.2
Video Review	56.8	64.3	118.6	129.3
Writers Digest	25.4	24.1	48.8	49.7
Yankee	74.6	91.6	165.0	184.3
Total Group	**1,770.6**	**1,610.6**	**3,307.6**	**3,027.9**
% change	+9.9%		+9.2%	

— Home —

Americana (6X)	—	—	32.4	30.8
Architectural Digest A	95.3	91.7	169.5	165.7
Better Homes and Gardens	95.8	87.5	165.4	150.6
Colonial Homes (6X)	—	—	58.0	49.5
Country Journal	47.3	43.2	98.2	100.1
Country Living	58.4	50.4	108.0	85.2
Dallas/Ft. Worth				
Home & Garden	52.7	51.1	105.3	108.0
Early American Life (6X)	29.4	24.4	29.4	24.4
Family Food Garden (6X)	—	—	63.0	64.0
Family Handyman (10X) A	63.6	66.1	125.3	129.6
Flower & Garden (6X)	60.3	53.2	60.3	53.2
Home	43.6	23.0	77.4	49.8
The Homeowner (6X)	—	—	27.8	22.2
Horticulture	29.6	31.1	57.0	72.4
House Beautiful	69.0	64.7	129.5	133.3
House & Garden	73.2	52.3	118.4	143.7
Houston Home/Garden	81.2	79.9	156.0	164.4
Metropolitan Home	57.2	52.5	104.7	99.7
New Shelter (9X)	46.6	53.0	101.7	106.7
1001 Home Ideas	33.8	36.7	59.6	61.5
Organic Gardening	91.6	102.2	183.4	199.9
Phoenix Home/Garden	58.8	41.5	114.8	82.4
San Diego Home/Garden	63.2	68.2	118.7	124.3
Southern Accents (6X)	—	81.3	49.0	81.3
Southern Living	116.6	108.1	195.3	180.5
Sunset Magazine A	131.1	129.6	199.8	192.2
Texas Homes	58.1	45.5	152.3	129.1
Workbench (6X)	—	—	61.4	68.0
Total Group	**1,456.4**	**1,437.2**	**2,921.6**	**2,872.5**
% change	+1.3%		+1.7%	

— In-flight & other passenger —

Aboard Group (7) (4X)	—	—	17.1	26.4
Alaskafest	43.6	32.5	79.1	67.7
American Way	110.1	81.0	201.8	142.4
East/West Network				
Amtrak Express	30.0	34.8	58.3	63.2
Continental	56.5	51.2	105.0	104.2
Eastern Review	122.7	87.0	232.4	167.0
Ozark	45.2	34.3	88.2	60.3
PSA Magazine	87.0	69.5	165.2	131.7
Pan Am Clipper	55.5	46.0	95.7	77.0
Republic Scene	57.2	41.0	108.7	77.0
United	102.8	70.5	194.1	135.3
USAir	61.5	49.5	111.5	90.5
Western's World	67.2	51.5	117.9	93.2
Halsey Publications				
Air Cal	48.3	24.6	86.3	51.9
Delta Sky	75.3	52.2	147.1	98.9
Skylite	20.0	—	39.0	19.2
Hawaii	22.2	17.3	44.4	33.1
Pace (6X)	—	—	77.8	35.8
Spirit of Aloha	20.9	16.0	41.8	30.6
Southwest Airlines	87.9	86.2	162.2	175.0
Frontier	29.4	35.5	69.1	71.8
Northwest Orient	36.3	28.9	64.0	65.6
TWA Ambassador	63.6	44.9	114.7	78.0
Total Group	**1,243.0**	**954.4**	**2,421.4**	**1,895.8**
% change	+30.2%		+27.7%	

— Men's —

Esquire A	53.1	50.3	98.0	100.0
Firehouse Magazine	26.0	28.3	67.5	67.9
Gentlemen's Quarterly A	113.3	82.9	178.7	126.2
Penthouse A	43.4	43.2	93.5	100.1
Playboy A	39.4	63.1	132.6	146.3
Total Group	**275.2**	**267.8**	**570.3**	**540.5**
% change	+2.7%		+5.5%	

— Metropolitan —

Aloha (6X)	25.2	21.2	25.2	21.2
Atlanta	61.3	34.9	88.7	73.0
Baltimore	55.4	58.4	100.2	103.9
Boston	112.8	105.4	229.5	225.2
California	46.7	42.5	74.3	71.6
California Living	34.1	48.4	74.2	87.3
Charlotte (10X)	23.0	19.6	23.0	40.1
Chicago	93.4	86.8	216.4	173.5
Chicago's North Shore	77.4	64.3	149.9	144.1
Cincinnati	40.7	47.1	87.7	96.1
Cleveland D.	86.0	57.6	135.9	108.9
Coast (38X)	76.6	65.1	153.6	124.7
Columbus Monthly	48.0	54.6	98.7	91.9
Commonwealth	22.7	21.5	74.7	41.7
Connecticut	75.4	68.3	146.9	136.2
Country Magazine	29.7	20.4	53.0	39.4
County Life	35.0	—	85.0	40.0
D/Magazine, Dallas/Ft. Worth	98.7	82.2	186.4	169.8
Denver	24.7	24.4	44.7	49.1
Exclusively Yours, Wisconsin (15X)	54.2	54.1	108.2	109.7
Grand Rapids	34.7	35.5	70.0	75.7
Gulfshore Life (10X)	104.0	80.0	202.0	152.8
Honolulu	56.8	69.3	108.0	120.3
Houston City	74.2	61.0	132.2	107.4
Indianapolis	46.0	29.8	86.0	91.6
Kansas City	40.1	32.7	71.7	53.7
Long Island Life	20.0	—	55.0	43.0
Los Angeles	167.0	152.0	317.0	302.0
Louisiana Life (6X)	—	—	63.2	68.0
Madison	42.0	40.0	92.0	80.0
Miami/South Florida	82.6	78.4	180.0	174.0
Milwaukee	30.3	—	57.2	10.7
Minneapolis/St. Paul	84.4	77.7	141.2	128.2
Monthly Detroit	39.9	58.4	62.4	95.4
Nashville	39.0	51.0	78.0	108.0
New Jersey Monthly	52.6	50.2	95.1	86.2
New Mexico	34.0	13.5	75.0	35.1
Ohio	39.1	33.7	72.8	64.7
Oregon	32.4	20.2	67.9	31.7
Orlando	78.8	73.0	155.0	136.0
Palm Beach Life	119.5	98.8	227.6	201.4
Palm Springs Life	146.8	152.0	318.2	302.5
Philadelphia	132.9	130.3	215.7	210.2
Phoenix	81.0	74.5	174.3	161.2
Pittsburgh	61.7	56.7	104.9	93.5
St. Louis	55.0	49.0	96.0	92.0
San Diego	102.7	111.4	223.8	229.7
San Francisco	58.4	52.5	106.2	90.0
San Francisco Focus	41.2	36.7	76.7	69.5
Shenandoah/Va. Town&Country (6X)	—	—	49.0	28.6
Tampa Bay Monthly	41.6	—	119.3	—
Texas Monthly	95.8	82.1	177.0	151.7
Twin Cities	46.7	37.2	93.3	72.6
Washington Dossier	48.7	52.8	86.7	91.8
The Washingtonian	137.0	138.0	246.0	241.0
Total Group	**3,387.9**	**3,005.2**	**6,652.8**	**5,947.6**
% change	+12.7%		+11.8%	

— Movie/romance/radio/tv —

Macfadden's Women's Group:				
Modern Romances	35.0	35.0	49.0	55.6
Secrets	35.0	35.0	49.0	55.6
True Confessions	35.0	35.0	49.0	55.6
True Experience	35.0	35.0	49.0	55.6
True Love	35.0	35.0	49.0	55.6
True Romance	35.0	35.0	49.0	55.6
Sterling Women's Group:				
Daytime TV	27.5	30.8	54.0	61.1
Modern Screen	20.5	34.8	20.5	33.3
Movie Mirror (6X)	20.5	—	41.0	—
Soap Opera Stars	20.5	24.3	40.0	48.5
TV Movie Screen (6X)	—	34.8	—	34.8
TV Picture Life (6X)	20.5	—	41.0	29.3
Teen Bag (6X)	6.5	—	6.5	2.4
Total Group	**326.0**	**334.7**	**497.0**	**543.0**
% change	−2.5%		−8.4%	

— Music/entertainment —

American Film (10X)	—	—	40.3	41.2
Audio	59.3	37.3	121.9	85.4
Circus Magazine	30.9	25.0	66.0	54.0
Dance Magazine	70.0	56.1	130.3	117.1
Musician	66.7	75.3	122.7	128.3
Playbill	45.2	50.0	92.4	94.3
Record	16.8	6.3	37.2	11.4
Stereo Review	40.2	44.7	82.5	85.4
Total Group	**329.1**	**294.7**	**693.3**	**617.1**
% change	+11.6%		+12.3%	

— Newspaper, Sun. magazines —

Family Weekly A	52.8	85.2	130.6	175.7
Parade	49.5	76.5	123.1	155.8
Total Group	**102.3**	**161.7**	**253.7**	**331.5**
% change	−36.7%		−23.4%	

— Outdoor & sport —

Alaska	37.4	33.3	72.2	64.8
The American Handgunner (6X)	—	—	39.8	37.0
American Hunter	16.1	14.3	30.8	30.5
American Rifleman	24.8	23.2	51.0	48.4
Backpacker (6X)	—	—	31.2	36.2
Bass Master (8X) A	52.9	47.9	97.1	101.4
Bicycling (9X)	—	—	92.9	87.9
Field & Stream	83.4	97.1	136.1	151.7
Fins & Feathers A	62.1	38.5	93.2	63.6
Fishing World (6X)	—	—	31.2	32.2
Florida Sportsman	97.3	78.2	172.4	139.6
Flying	37.3	40.0	69.5	60.7
Fur-Fish-Game	23.5	22.9	50.7	45.6
Golf Digest	104.4	92.0	147.9	139.6
Golf Magazine	131.7	119.7	269.4	232.9
Guns	28.8	27.4	55.7	55.7
Guns & Ammo	41.9	41.9	71.3	81.0
Muscle & Fitness	102.0	104.0	221.0	208.0
Outdoor Life	89.4	85.3	140.0	139.4
Petersen's Hunting	29.8	34.0	55.0	61.1
The Runner	35.4	37.2	73.2	74.2
Runner's World (13X)	35.3	38.3	85.5	38.6

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. D. 1984 year to date figure reflects additional seven pages from classified advertising not originally included in January figures. * All affiliated with Sunday Mag/Net. except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 58)

ad linage

(Continued from Page 57)

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983
Salt Water Sportsman	82.9	61.3	145.7	125.4
Shooting Times	44.0	40.7	75.3	66.2
Ski (8X) A.	65.0	50.1	160.1	133.2
Skiing (7X)	73.8	60.1	161.1	147.1
Skin Diver	88.0	85.9	159.9	148.3
Southern Outdoors (8X)	—	—	36.4	40.8
Sport	48.8	31.3	85.2	60.8
Sports Afield	88.9	83.6	151.5	146.5
Tennis	61.5	65.6	105.4	112.5
Western Outdoors (10X)	47.4	31.3	47.4	31.3
World Tennis	26.0	24.3	49.7	59.4
Total Group	**1,659.8**	**1,509.4**	**3,264.8**	**3,051.6**
% change	+10.0%		+7.0%	

— Photography —

American Photographer	33.3	45.7	71.6	91.4
Petersen's Photographic	31.0	29.3	60.7	64.1
Popular Photography	94.6	114.3	184.7	226.5
Total Group	**158.9**	**189.3**	**317.0**	**382.0**
% change	−16.0%		−17.0%	

— Religious —

BBI Jewish Monthly (10X)	22.1	24.9	40.3	40.3
Christian Herald	34.5	30.0	66.7	64.5
Christian Life	27.2	20.1	51.2	48.9
Christianity Today	74.8	86.5	115.0	142.2
Inside (4X)	—	—	—	—
Moody Monthly	53.8	52.4	97.2	102.9
Today's Christian Woman (6X)	—	—	24.2	—
Total Group	**212.4**	**213.9**	**394.6**	**398.8**
% change	−0.7%		−1.0%	

— Science/electronic/mechanic —

Compute	92.7	126.2	204.8	238.0
Computers & Electronics	49.4	69.6	101.4	139.9
Creative Computing	132.5	179.0	291.2	368.7
Discover	49.7	54.4	77.9	86.8
Family Computing	60.7	—	131.1	—
Mechanix Illustrated	62.4	64.6	113.7	124.7
Omni	50.3	50.2	105.6	99.5
Personal Computing	—	—	—	—
Popular Mechanics	90.2	88.2	169.9	160.9
Popular Science	74.5	77.4	152.9	146.9
Science Digest	27.7	28.0	52.6	60.3
Science 84 (10X)	—	—	39.3	38.3
Scientific American	51.8	50.6	114.5	84.8
Spectrum	73.5	78.3	168.2	158.4
Total Group	**815.4**	**866.5**	**1,723.1**	**1,707.2**
% change	−5.9%		+0.9%	

— Women/fashion/service —

Bride's Magazine (6X) A.	—	—	517.0	495.0
Cosmopolitan A.	183.5	155.0	334.9	304.6
Essence	85.8	69.7	145.2	131.7
Family Circle A.	105.0	113.0	243.4	250.2
Glamour	133.5	146.0	230.1	244.8
Good Housekeeping A.	159.9	163.9	268.5	280.1
Handmade (6X)	—	—	26.4	30.4
Harper's Bazaar	131.4	99.6	207.5	166.7
Health	38.7	32.2	71.1	52.5
Ladies' Home Journal	96.6	80.5	189.8	155.4
Ladycom	51.0	44.0	80.5	74.5
Lady's Circle	8.9	7.8	17.1	17.0
Mademoiselle	133.2	100.2	205.3	170.6
McCall's	93.4	80.9	160.7	148.2
Modern Bride (6X)	—	—	413.8	398.1
Ms.	45.1	38.0	75.2	67.8
New Woman	46.3	49.4	82.2	81.6
Parents Magazine A.	72.4	74.7	125.9	127.8
Playgirl	38.2	41.7	74.6	82.5
Redbook	85.5	82.7	157.1	140.2
Self	78.8	63.4	138.1	112.1
Seventeen	74.7	78.3	140.5	139.6
Shape	51.0	40.0	103.0	73.0
Soap Opera Digest	27.9	27.3	54.4	45.5
'Teen Magazine	39.3	44.4	65.7	65.6
True Story A.	72.0	69.1	100.0	110.9
Vogue	263.6	219.2	383.3	346.1
W Magazine	139.2	113.0	224.4	197.0
Weight Watchers	35.4	32.2	60.8	55.9
Woman's Day A.	94.0	110.8	167.2	175.5
The Workbasket (10X)	46.0	31.8	86.5	74.5
Working Mother	67.9	59.3	122.0	110.5
Working Woman	82.2	83.0	146.6	147.0
Total Group	**2,580.4**	**2,351.1**	**5,418.8**	**5,072.9**
% change	+9.8%		+6.8%	

— Youth —

Boys' Life	18.2	22.6	34.2	46.1
Campus Life	38.1	37.0	91.1	73.4
Total Group	**58.3**	**59.6**	**125.3**	**119.5**
% change	−5.5%		+4.8%	

January

	Pages Jan. 1984	Pages Jan. 1983
— Business —		
Atlanta Bus. Chronicle (52X)	30.6	40.5
Barron's (52X)	200.1	187.9
Black Enterprise	27.0	19.7
Boston Business Journal	86.4	54.5
Business Week (52X) A.	252.6	237.7
California Business	67.9	54.0
Capital District Bus. Review	45.9	36.5
Corporate Report/Kansas City	85.4	43.0
Corporate Report/Minnesota	79.5	75.9
Crain's Chicago Bus. (52X)	114.4	83.5
Crain's Cleveland Bus.	54.6	55.4
Dallas/Ft. Worth Bus. (52X)	33.3	37.5
Dun's Business Month	61.0	39.0
The Executive	50.2	39.8
Financial World (24X)	30.8	27.6
Florida Trend	91.7	69.2
Forbes (26X)	261.6	205.9
Fortune (26X) A.	198.6	127.8
Frequent Flyer	35.4	30.0
Hawaii Business	36.8	44.7
High Technology	18.5	30.9
Houston Bus. Journal (52X)	127.6	163.7
Inc. Magazine A.	101.3	64.3
Income Opportunities (10X)	—	—
Industry Week (26X) A.	79.0	77.8
Indianapolis Business Journal	105.1	94.8
New Orleans Citibusiness	115.6	—
Nation's Business A.	18.9	20.0
New England Bus. (20X) B.	41.7	38.2
New Jersey Success	—	—
Pacific Business News (52X)	86.6	93.7
Philadelphia Bus. Journal	79.0	65.0
Pittsburgh Bus. Times (52X)	64.0	57.0
Savvy	44.2	36.6
St. Louis Business Journal	130.1	99.0
Texas Business	58.5	33.5
Venture	57.3	40.8
Total Group	**2,971.2**	**2,425.4**
% change	+22.5%	
— Newspaper Sunday magazines* —		
Arizona Republic	60.9	67.7
Boston Globe	160.5	143.0
Chicago Tribune	58.1	69.6
Cincinnati Enquirer	62.5	64.4
Cleveland Plain Dealer	33.6	52.6
Columbus Dispatch	28.7	31.8
Dallas Times Herald	61.4	67.2
Denver Post	64.3	102.7
Detroit News	65.0	72.2
L.A. Times Home Magazine	86.8	51.7
Louisville Courier-Journal	61.7	61.7
Miami Herald	42.7	55.0
New York News	23.9	41.7
New York Times Magazine	204.4	198.6
Philadelphia Inquirer	54.3	52.3
Toledo Blade Magazine	35.6	37.4
Washington Post	71.7	89.2
Total Group	**1,176.1**	**1,238.8**
% change	−5.0%	
— Weeklies/bi-weeklies —		
The Advocate (25X)	119.3	146.9
Army Times Military Group:		
Air Force Times (52X)	125.0	136.2
Army Times (52X)	121.4	132.3
Navy Times (52X)	137.6	156.5
The Times Magazine	6.8	5.8
The Blood-Horse (52X)	671.6	641.5
Capper's Weekly (26X)	38.9	25.9
Commonweal (22X)	7.9	9.2
Golf World (43X)	66.7	71.2
Grit (52X) A.	36.9	37.1
National Review	19.0	20.9
New Republic (48X)	24.3	25.0
New York Magazine (50X)	145.0	135.9
New Yorker (52X)	204.5	225.6
Newsweek (52X) A.	205.5	143.7
People (52X)	184.6	164.1
Rolling Stone (25X)	40.5	38.9
Sporting News (52X)	46.8	46.6
Sports Illustrated (52X) A.	154.7	161.8
Time (52X) A.	177.1	194.0
Travelhost (52X) C.	2,405.0	2,419.0
TV Guide (52X) A.	327.5	346.5
Us Magazine (26X)	48.5	57.3
U.S. News & World Report (52X) A.	96.9	108.9
Total Group	**5,412.0**	**5,450.8**
% change	−0.7%	
— Foreign —		
Buenhogar:		
Central America	—	1.0
Colombia	11.7	17.2
Dominican Republic	7.0	12.0
Ecuador	12.0	3.0
Mexico	17.3	29.0
Peru	9.5	11.8
Puerto Rico	7.0	9.3
U.S.	9.5	7.8
Venezuela	12.0	17.0
Coqueta:		
Central America	—	—
Colombia	4.0	1.0
Mexico	2.5	2.0
Peru	—	—
Puerto Rico	0.5	—
Venezuela	1.0	2.0
Geomundo:		
Central America	1.3	2.0
Chile	1.3	3.0
Colombia	1.0	6.0
Ecuador	1.0	3.0
Mexico	0.3	6.0
Peru	1.3	3.0
Puerto Rico	2.3	2.0
Venezuela	10.3	6.0
Hombre De Mundo:		
Central America	5.0	4.0
Chile	4.0	4.0
Colombia	4.0	8.0
Ecuador	4.0	5.0
Mexico	4.0	6.5
Peru	4.0	3.0
Puerto Rico	3.0	3.0
Venezuela	9.0	10.0
Ideas Para Su Hogar:		
Central America	—	—
Chile	—	—
Colombia	3.0	13.0
Ecuador	2.0	1.0
Mexico	1.3	14.7
Peru	4.5	3.0
Puerto Rico	—	—
Venezuela	8.5	7.5
Intimidades:		
Central America	—	—
Chile	—	1.0
Colombia	—	1.0
Mexico	0.5	2.5
Puerto Rico	—	1.0
Venezuela	3.0	3.0
Mecanica Popular:		
Argentina	5.8	6.7
Central America	9.7	11.3
Chile	3.5	5.8
Colombia	9.2	18.2
Mexico	7.3	9.2
Peru	9.7	14.7
Puerto Rico	10.7	11.3
Venezuela	10.7	20.7
The Ring en Espanol:		
Mexico	—	—
Puerto Rico	—	—
U.S.	1.3	1.0
Venezuela	—	1.0
Vanidades Continental:		
Central America	1.3	2.2
Chile	—	0.7
Colombia	21.0	21.2
Dominican Republic	1.0	6.2
Ecuador	3.7	2.8
Mexico	24.7	49.0
Peru	9.7	10.5
Puerto Rico	11.5	19.7
U.S.	30.5	27.5
Venezuela	16.7	20.5
Business Week Int'l.	66.4	91.1
Cosmopolitan Foreign Editions:		
Australia	47.1	44.6
Brazil	30.0	33.0
France	68.3	37.2
Germany	30.0	18.3
Great Britain	70.3	39.0
Greece	38.0	50.0
Holland	9.0	6.0
Italy	15.7	17.3
Japan	27.7	33.3
Cosmopolitan en Espanol:		
Central America	—	0.3
Colombia	—	5.8
Ecuador	—	0.7
Mexico	14.8	25.2
Peru	—	4.7
Puerto Rico	6.2	12.0
U.S. (Spanish language)	11.7	12.7
Venezuela	6.5	6.8
International Communications:		
African Business	13.3	16.5
New African	19.8	20.5
The Middle East	18.3	17.8
International Herald Tribune	54.3	61.3
International Management:		
Africa	6.8	10.8
Europe	18.0	20.7
Latin America	3.0	4.7
Middle East	15.5	9.2
Pacific	5.7	10.5
Johnston International:		
Alam Attijarat	40.7	41.0
Ejecutivo	6.3	8.3
Modern Africa	13.6	18.5
Modern Asia	19.5	34.1
Newsweek International-A:		
Atlantic	50.1	44.0
Latin America	52.0	39.4
Pacific	24.0	20.4
Reader's Digest:		
Arabic	8.0	9.5
Asian	155.5	201.0
Australian	59.0	26.5
Belgian-Flemish	25.0	31.0
Belgian-French	20.5	22.5
British	44.6	57.4
Chinese B.	94.5	79.8
Danish	24.3	44.3
Dutch	27.0	31.0
Finnish	37.0	37.5
French	33.3	30.3
German	57.2	42.7
Iberian	5.0	13.0
Indian-English	67.0	58.5
Indian-Hindi	4.0	1.5
Italian	19.5	27.0
Japanese	23.9	43.1
Korean	24.5	19.3
Latin American:		
Argentina	15.5	5.0
Brazil	2.0	10.0
Central American	5.0	5.0
Chile	12.5	8.5
Colombia	24.0	22.5
Ecuador	6.0	8.5
Mexico	20.4	33.3
Peru	7.0	7.5
Puerto Rico	3.0	3.5
U.P.B.	2.0	8.5
U.S. Spanish	9.5	9.5
Venezuela	3.0	7.5
New Zealand	40.5	40.5
Norwegian	14.8	13.0
Portugal	15.0	25.0
South African	46.0	27.0
Swedish	27.0	16.0
Swiss-French	22.0	11.1
Swiss-German	27.6	16.0
Time International:		
Time-Asia	52.5	53.2
Time-Atlantic	38.4	55.1
Time-Canada	106.2	82.4
Time-Latin America	20.6	31.1
Time-South Pacific	54.1	52.3
Visao (52X)	—	—
Vision/Latin America (26X) A.	10.8	18.4
Total Group	**2,478.4**	**2,657.5**
% change	−6.7%	

New Fonda 'Workout' warms up

NEWPORT BEACH, CAL.—Jane Fonda is working up a sweat again.

Karl Video Corp. here, the company that two years ago introduced the now best-selling videocassette, "Jane Fonda's Workout," will offer a new tape in March designed to appeal to hard-core fitness freaks.

This time, the actress will lead the "Jane Fonda's Workout Challenge," a 90-minute program tailored for athletes, dancers and other serious devotees of aerobic exercise.

"Workout Challenge" is not meant to be a sequel to the earlier tape, a company spokesman said, but rather the latest in a series of tapes developed to appeal to specific market segments. The new tape, which will cost $59.95 at retail, also is available on RCA videodisc for $19.99.

"Workout Challenge" is the latest of several new titles planned by Karl Video. "Prime Time," an exercise tape for middle-age and older people, will be introduced this fall.

To accompany the debut, Simon & Schuster will publish a book of the same title, as it did with the original "Workout."

Next month, Ms. Fonda will begin promoting "Workout Challenge," appearing on tv shows and in department stores in major cities.

Although there will be no consumer campaign, Karl is offering a co-op ad plan for its retailers.

Videocassette sales also will get a boost from the apparel industry. Capri Beachwear, New York, in March will offer a new line of "Jane Fonda's Workout" activewear (AA, Nov. 21). Zimmerman, Galanty & Fiman, Santa Monica, is the agency.

"Jane Fonda's Workout," the book, videocassette and videodisc, were introduced in 1982.

In 1983, Karl Video came out with its second tape in the "Workout" series, "Jane Fonda's Workout for Pregnancy, Birth and Recovery."

Braniff rivals fuel promotions

By TOM BAYER

DALLAS—Airlines have continued to deny that they are concerned about the March 1 reentry of Braniff to the competitive skies.

Yet, route expansions, fare reductions and promotions are beginning to emerge and they coincide with Braniff's startup days.

Delta Air Lines is planning to increase the frequency of flights on six Dallas-Fort Worth routes scheduled for Braniff service. The increased frequencies beginning in May and June are to Austin, Tex.; Kansas City, Mo.; New York's LaGuardia; Oklahoma City; Ontario, Cal., and San Antonio.

With the increased schedule, Delta will have 136 daily departures from Dallas-Fort Worth, compared with Braniff's 82 and American Airlines' 275.

Continental Airlines on March 1 will add flights from existing markets, including Oklahoma City, Minneapolis-St. Paul, Kansas City, Washington, Tulsa, Los Angeles and Denver, and will start service from Detroit and Philadelphia.

Continental is expecting its two millionth passenger Feb. 21 and is planning to reward the person with a one-month pass for unlimited travel on Continental.

It also will lower fares Feb. 21 in 73 markets between the Midwest-Northeast and West Coast. Promotional unrestricted fares will end March 31 or April 30.

Some reduced fares will have no expiration, Continental said.

United Airlines on Feb. 17 said it would match in selected Midwest cities additional fare cuts announced by Continental. United had matched Continental's first wave of price reductions on western and midwestern flights announced earlier last week.

A United spokesman also said the carrier would not meet Continental's cuts to several eastern markets for fear "it would trigger a systemwide fare war."

Southwest Airlines last week began a 10-week "Puttin' on the Ritz" consumer sweepstakes with Avis, in which the grand prize is a 1984 Cadillac Eldorado Biarritz with a customized interior to match the new interiors of Southwest's aircraft.

More than 60 other prizes will include various trips on Southwest Airlines, and passengers who book their flights through travel agents will get free upgrades on their Avis rentals.

American Airlines has announced a series of discount fares offering 20% to 30% off normal coach fares for travel to and from California during the 1984 Olympic Games in Los Angeles.

One set of fares is in effect for tickets purchased through May 15, and a second group of fares will be available May 16 through the Olympic season, American said.#

Agency financial results

With most agencies reporting (JWT and DDB have not released results yet), 1983 will go on the books as a good year for revenues — all except for Mickelberry showed a double-digit increase. Source: *Advertising Age*.

Agency	Income ($000) 1982	1983	(%)	Revenues ($000) 1982	1983	(%)
Fourth quarter						
BBDO	5,550	6,872	+23.8	61,959	78,561	+27
FCB	4,157	4,431	+ 6.6	48,657	57,622	+18
Grey	2,342	2,653	+13.2	40,287	47,660	+18
Interpublic	6,997	9,679	+38.3	170,256	178,161	+ 5
Mickelberry	1,621	1,227	−24.3	25,189	26,901	+ 6
O&M	5,991	8,994	+50.1	95,863	108,940	+14
Ally*	1,020	873	−14.4	45,299	50,709	+12
Twelve months						
BBDO	14,982	18,055	+20.5	212,739	263,999	+24
FCB	10,912	13,070	+19.8	179,990	206,605	+15
Grey	6,809	8,026	+17.8	142,150	161,992	+14
Interpublic	21,075	25,380	+20.4	565,435	603,044	+ 7
Mickelberry	2,792	2,601	− 0.7	74,729	91,245	+22
O&M	14,840	17,800	+19.9	327,411	358,395	+10
Ally*	1,029	1,031	+ 1.9	69,130	85,321	+23

*Ally & Gargano's results are for the second quarter and first half of fiscal year.

Magazine acquisitions begin

By STUART J. ELLIOTT

NEW YORK—The anticipated boom in magazine acquisitions this year (AA, Jan. 30) got under way last week when:

- *Interior Design* and *Corporate Design* were sold by Whitney Communications here to Cahners Publishing Co., Boston.
- A joint-venture company was announced to publish *Success*.
- Gralla Publications here bought its first property since being acquired by Great Britain's United Newspapers (AA, Sept. 5).

The Whitney move was somewhat of a surprise, as the company was known to have solicited bids for all of its magazines in a package buy—not only the two design books but also *Art in America*, *50 Plus* and *Waterway Guide*, a quartet of annual regional publications.

Sources said the bids were in the range of $30 million to $40 million. Details were not disclosed.

Interior Design, a monthly with a circulation of 49,161, is the largest publication for the interior design trade. *Corporate Design*, an every-other-monthly with a controlled circulation of 25,000, is aimed at corporate design and building executives. Both will remain based in New York, under publisher Lester Dundes. Their place in the Cahners organization is yet to be determined.

The joint venture to publish *Success*, a monthly with a circulation of 233,417, is being established by Success Unlimited, Chicago (and its chairman, W. Clement Stone), and Hal Publications, New York (and its chairman, Dale Lang). Each purchased an interest in the other's company, though the extent of their new equity positions has not been revealed.

The joint company, of which Hal will be the "managing partner," according to Mr. Lang, will assume control of *Success* with the September issue. James Horton, president of Hal, which publishes *Working Woman*, will become publisher of *Success*. He succeeds Charles Colletti.

Mr. Colletti, who was on vacation last week and could not be reached for comment, recently denied that a sale of his magazine was pending. *Success*' editorial offices are to be moved to New York from Chicago, joining the business offices.

Mr. Lang last year engaged in fruitless negotiations with Time Inc. concerning a possible joint venture or buyout (AA, May 9).

Gralla announced it is buying *Sew Business*, the leading magazine for retailers and marketers in the home sewing, fabrics and crafts industry, from Sylvan Publishing, Fort Lee, N.J. Purchase price was not disclosed.#

Spot the similarities?

"Where's the beef?" has a commercial ancestor: "How's it taste?"

The popular Wendy's commercial was directed and produced by Chicago's Joe Sedelmaier, whose trademark is the use of unusual characters that he draws from the everyday world. Clara Peller, the 80-year-old former manicurist from Chicago whose current "Where's the beef?" line now is part of the vernacular, has starred in many Sedelmaier commercials, including one with rabbits for Jartran truck rentals and one for Rhodes frozen bread dough, a product of Dakota Bake-N-Serv.

The Rhodes spot was shot late in 1982 for Minneapolis agency Fallon McElligott Rice, and ran regionally in the Midwest. (FMR recently lost the account when the client relocated to another city.)

The commercial centers on five elderly matrons, a loaf of bread and a knife. It incorporates music from the same composer Mr. Sedelmaier always uses; a voiceover talent he uses in many spots, and has the "Sedelmaier look" that comes from the director's close involvement in the writing and designing of all commercials he produces for agencies (AA, Nov. 11, '82).

"Cut it, Edna," the first matron says in that spot. "No, you cut it," demures Edna, who is headed off by Ms. Peller's character who says, "Don't look at me, I'm too nervous."

"How's it taste?" her character asks.

"Buttery" is the response.

Patrick Fallon, president of the Minneapolis shop, says the agency has received phone calls from members of the local advertising community asking if FMR is disturbed by the similarities between the two spots. "It comes with the territory," Mr. Fallon says, referring to working with Mr. Sedelmaier.

Tom McElligott, vp-creative director of the agency, has produced more than a dozen spots with the Chicago director. Sources at FMR describe him as "disappointed with Mr. Sedelmaier" about the similarities in the two spots.

Mr. Sedelmaier, however, has his own "beef" with the Rhodes spot. After he had finished the commercial, he says, the agency deleted Ms. Peller's distinctive voice and dubbed in a "sweet little old lady" voice, Mr. Sedelmaier says.

Mr. Fallon confirms: "We didn't like her voice. It just was not understandable."

Wendy's "Where's the beef?" used Ms. Peller's own voice—rough-edged though it is. "Clara's voice is what made that thing," Mr. Sedelmaier says.#

Wendy's

(Continued from Page 3)

tle, Wendy's is reveling in a wave of free publicity worth many times the $8 million spent on the campaign.

Negative publicity has come from the Michigan Commission on Services to the Aging, which last month asked Wendy's to withdraw the ads. Gray Panther national president Margaret Kuhn said some members had voiced displeasure with the spots' depiction of the elderly.

A Wendy's spokesman expressed regret that offense was taken in some quarters, but said the company feels the spots portray the characters as "strong-minded enough to demand quality."

Meanwhile, Wendy's also is working the other end of the demographic spectrum. Last week it launched a new premium promotion for its Kids Meal with the first national consumer introduction of the "Moodies."

The little characters, which personify various emotions, will be offered through March as part of Wendy's efforts to improve its appeal to children (AA, Oct. 24).

Wendy's says 65 licensed Moodies products are being marketed and that the characters soon may be the subject of a children's book line and comics strip.

Kent Toys and Sisson Associates, New York, its licensing agent, report the Moodies products will reach 200; 20 company licensees are signed up thus far.

No advertising support for the Moodies is planned.#

Wall Street keeps up confidence in shops

By PAT SLOAN

Wall Street's new-found confidence in the advertising industry continues, backed by the latest round of agency yearend results.

Agency stocks generally have performed no worse than the overall stock market in its recent slide. "So far, so good," says Dean Witter Reynolds' Fred Anschel. "Ogilvy's fourth quarter was somewhat above my expectations and BBDO is on target."

He said results from both JWT Group and Doyle Dane Bernbach are due at the end of March. He expects both will be "okay."

At Foote, Cone & Belding Communications, Norman W. Brown, chairman, says, "Our fourth-quarter results were significantly better than we anticipated when we last reported earnings in November.

"Revenues exceeded budget in every region but one, with the largest increase occurring in our three U.S. regions and in the FCB Associated Communications Cos. FCB/Europe and FCB/Latin America-Pacific also showed important gains," he said.

In connection with the NCK Organization merger, Mr. Brown added that although merger activities added to 1983 costs, no revenues will be realized until 1984.

Among those agencies that have released their results, only Ally & Gargano showed a slip in the quarter ending Dec. 31, 1983 (the second quarter in Ally's fiscal year). While billings rose 12% to $50.7 million from $45.3 million a year earlier, net earnings dropped about 14% to $873,000 from $1 million.

Wall Street has not yet begun to follow closely Ally & Gargano, which went public in late 1983. The drop in earnings was presumably caused by the phaseout of the Commodore International account. Although the agency has picked up six new accounts (Union Carbide Corp., Pfizer, Franklin Computing, Comp-U-Card, WYNY [fm] and SFN Electronic Publishing) since the loss of Commodore last year, those account gains have not yet had an impact on earnings.

Last week, the agency also picked up Bryan Foods, the $400 million division of Consolidated Foods. Previously at Henderson Advertising, Bryan Foods billings are estimated at $2.5 million.

Mickelberry Corp.'s last fiscal quarter earnings were down, but Alan Gottesman, a vp with L.F. Rothschild, believes this has not been because of poor management but rather because "they have grown so fast." He is looking for earnings improvements in 1984 "as long as the agency's acquisitions pan out and advertisers do not pull back from spending."#

Almay deodorant line set

(Continued from Page 2)

be priced at the high-end of the market. The 2-oz. super dry solid will sell for about $2.51, the 4-oz. spray for $2.33 and the 1.5-oz. roll-on for $2.06, according to Almay.

The Playtex/Almay deodorant effort comes at a time when category dollar volume is on the rise, according to Towne-Oller. In 1982, the market grew only 10.5%, but in the first, second and third quarters of 1983 it grew by 11.3%, 11.2% and 17.5%, respectively.

Although the $1 billion market continues to be led by Procter & Gamble and Gillette Co., with total-brand shares of 23.3% and 20%, respectively, according to Salomon Bros.' Diana Temple, Gillette's $28 million restaging of Right Guard has not yet stopped market share erosion. In September, Right Guard had a 9.3% share in supermarkets, down from 9.9% in 1982. At that time, Dry Idea also was down, while Soft & Dri appeared to be holding.

Ms. Temple believes, however, that Gillette's Body Flowers deocologne could rack up sales of $25 million by the end of 1984.

Procter & Gamble's Sure and Secret brands also slipped in share. According to Salomon Bros. data, Sure has an 11.9% share, down from 13.6% in 1982, and Secret has 11.3%, down from 12.5%. P&G is now testing Oasis, a dual-layered deodorant/antiperspirant stick that Ms. Temple expects will soon be rolled out.

Industry estimates show Mitchum slightly up in market share to just under 3% in supermarkets. Mennen gained some momentum in the first nine months of 1983 with its Lady Speed Stick, a brand that earned a 1.2% share in the third quarter with $4 million in advertising support.

Carter-Wallace's Arrid also gained share, Ms. Temple said, moving up one percentage point to a 13.7 share by the end of the third quarter. Unilever's Impulse deocologne increased share by half a per cent to 3.2%.#